

ESC Equitable Small Claims Software

Equitable Small Claims (ESC) software manages and allows a high degree of control over the Small Claims process.

With a few clicks of a mouse and a few seconds, the assessor can produce a reliable market analysis that can be used to review/defend assessments.

ESC software can quickly identify comparable sale properties and applies accurate adjustments to determine a reliable market value for informal reviews or small claims proceedings.

ESC software creates a hearing/court ready document with all the appropriate information. Built-in flexibility gives the assessor the ability to apply local knowledge providing greater accuracy to the valuation process.

The program uses your inventory and sales data to complete the valuation process. The valuations can be produced in either single parcel inclusive of sales map or multiple (mass) property modes.

Using our experience in the small claims process, ESC was designed from the ground up to provide maximum flexibility for the user. The assessor has control over all critical settings in the software that produces the market analysis. Using his local knowledge, he can set and reset the critical program parameters until he reaches a point where the property analysis reflects an equitable value.

Program Features and Benefits

Features:

- User defined weightings as follows:
 - Neighborhood
 - Living Area
 - Building Style Matrix
 - Distance between Subject and Sale Comparables
 - School District
 - Same Street
 - Property Class
 - Property Age
 - Waterfront
- User defined dollar adjustments based on six user-defined dollar ranges. The following adjustments can be calculated based on one of two available methods.
 1. the equalized value of a subject property or
 2. the average time adjusted sale amount of comparables chosen.

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Features continued: User defined dollar adjustments for:

- Land Area
 - Living Area
 - Bathrooms – Full and Half
 - Garages
 - Basements
 - Fireplaces
 - Central Air Conditioning
 - Waterfront
 - Two manual adjustments available for each comparable sale
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- User defined Time Trending of comparables for changes in housing market conditions for quarterly periods from 3 years prior and 1 year past the municipality's valuation date.
 - User defined adjustments as a percentage of sale price for Location and Condition values ranging from Excellent to Poor. Or define your own!
 - User defined Upper and Lower Range of Comparable Sales to be selected based on the equalized value of the subject property.
 - Can be run in single or mass property modes (ex.hearing case loading)

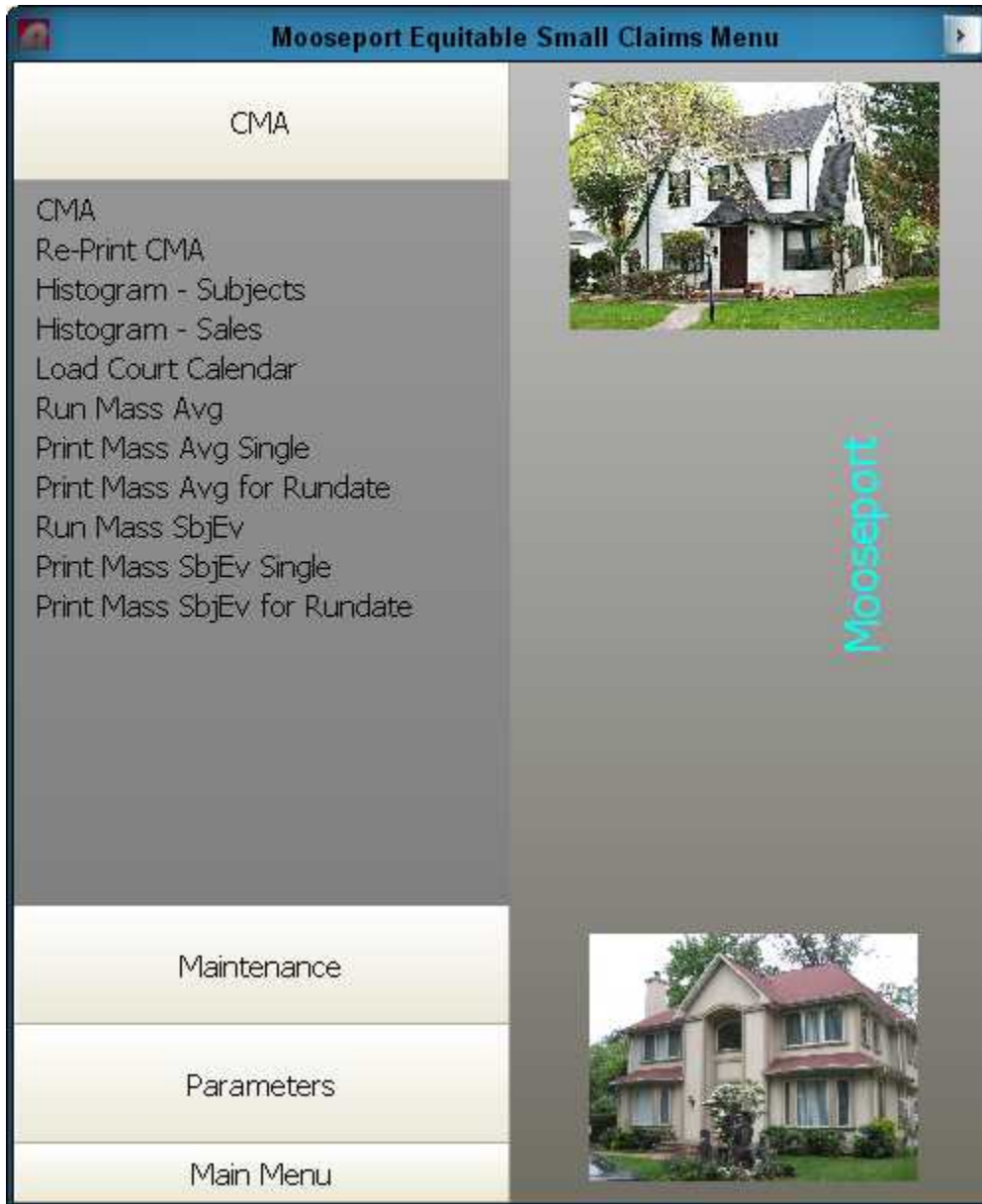
Benefits:

- Fast Market Value production
- Flexible analysis preparation
- Three modes of preparation
- Market Analysis History
- Ability to Reprint Market Analysis
- Run Multiple times
- Maps available
- Hearing ready output format
- Runs on Microsoft Windows operating systems
- Cost Effective
- Reduce staff time

ESC Equitable Small Claims Software

For your review, we have prepared a few screen shots to show you the power and flexibility of ESC software. We have tried to be as complete as possible, but we cannot answer all questions in one document. So please call us for more information or to arrange for a demonstration.

Screen Shot 1



Market Analysis Menu

The easy to use main menu sets up the program parameters, provides meaningful maintenance routines and produces flexible methods of market analysis preparation.

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Screen Shot 2 – Property Market Analysis Entry

Enter Property to Process by Legal Id or Address

Sales Date Cutoff: 01/01/2010
Valuation Date: 01/01/2012

Last Subject

Legal Id
Section: 81
Block: 238
Lot: 8
AV: 431,000.00
Prior AV: 431,000.00

Address
House #: 18
Street: HENRY

Owner: RIZZARDI - DYER, KIM
Style: 03 SPLIT LEVEL
Prop_Class: 210
Lot_Acres: 0.2314 Built: 1956
LSQFT: 1626
Full_Baths: 1 Half_Baths: 1
Basement: 4 Full
Garage: 1 Fireplace: 1
Heat_Type: Waterfront:

Run Market Analysis

Edit This Subject
Edit a Subject
Edit a Sale
Enter a Sale
Style Matrix
Weightings
Adjustments
Time Trend

S EV Method

Quit

Google

This single entry screen is used for actual market value analysis preparation for a single property. The user can enter the subject property by the Legal Id or Street Address.

From this screen, changes can be made to the Style Matrix, Weightings, Adjustments and Time Trend settings. The user can also Edit the subject, Edit a different subject, Edit a Sale property or enter a New Sale property.

The method of selecting adjustment values for the Market Analysis is shown on the lower left of the screen. In this case, the equalized value of the subject property is being used to calculate dollar adjustments.

If the Internet is available at the work station, a Google map of the subject property can be viewed here.

ESC can also be used to prepare Market Analysis in Mass Mode or Scheduled Hearing Date Mode.

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Screen Shot 3 - Market Valuation Results

Subject Property 18 HENRY Legal Id:81/238/B

Prx	Subject	Sale 1	Sale 2	Sale 3	Sale 4	Sale 5					
Address: 18 HENRY	14 HENRY	27 HENRY	31 DANIEL	22 MC LOUGHLIN	39 DANIEL						
Municipality: Mooseport	Mooseport	Mooseport	Mooseport	Mooseport	Mooseport						
School: 5	5	5	5	5	5						
Neighborhood: 17	17	17	17	17	17						
Style: SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL						
Legal: 81 238 8	81 238 9	81 237 10	81 239 11	81 236 1	81 240 1						
SWIS: 280500	280500	280500	280500	280500	280500						
Class: 210	210	210	210	210	210						
Age/Effective: 1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956						
Distance: 0.02	0.06	0.06	0.09	0.09	0.12						
Sale: 06/24/2010	06/07/2011	05/10/2010	01/13/2010	01/18/2011							
Time Adj: Days: 556	Days: 208	Days: 601	Days: 718	Days: 348							
Location: Average	Average 0%	Average 0%	Fair 5%	Average 0%							
Condition: Average	Average 0%	Average 0%	Fair 5%	Average 0%							
Adj Sale Pr: 524,160.00	448,800.00	496,048.00	366,000.00	512,773.63							
Adjustments:											
Land Area: 0.2314	0.2314	0.234	0.2112	0.2443							
GLA: 1626	1497	1626	1497	1509							
#Full Baths: 1	1	1	1	1							
#Half Baths: 1	1	0	0	1							
Basement: Full	Full	Full	Full	Full							
Garage: 1	1	1	1	1							
Fireplace: 1	0	1	2	0							
Central Air: None	None	CAC	None	CAC							
Water Front:											
Pool:											
Other:											
Total Adjustments:	10,160.00	-5,342.00	-2,342.00	2,800.00	2,994.00						
Adjusted Value:	534,320.00	443,458.00	493,706.00	368,800.00	515,767.63						
Subject EV: 431,000.00	467	-7540	3993	13388	14019						
Mean: 471,210.33											
Trimmed Mean: 493,000.00											
Median: 493,706.00											
% Variance: -4.8											
	#	Street	Sale Date	Price	Class	Built	Land Area	Style	GLA	Proximity	Weighting
	14	HENRY	06/24/2010	468,000.00	210	1956	0.2314	SPLIT LEVE	1497	0.02	467
	27	HENRY	06/07/2011	420,000.00	210	1956	0.234	SPLIT LEVE	1626	0.06	-7540
	35	HENRY	12/20/2011	469,000.00	210	1956	0.2314	SPLIT LEVE	2597	0.09	66460

This is the Market Valuation results screen. ESC uses all the settings established in the Maintenance Menu, specifically the settings for weightings, style matrix, adjustments, time trending and sale selection range to produce a market analysis for the entered property.

But this is not the end of the process. The user can enter manual adjustments, remove and replace selected sales, use only 3 sales or use only 4 sales, view and replace sales by proximity.

If the Internet is available at the work station, each sale can be Googled possibly revealing additional adjustments. The Market Analysis can be printed to the screen, printer or file. When the Finished button is clicked a date and time stamp is saved in the data allowing the user to save multiple analyses for the same property.

On the lower portion of the screen is a grid showing same street sales.

Proximity Sales

Screen Shot 4 – Selecting Proximity Sales

The screenshot displays the 'Proximity Sales' selection interface. At the top, there are tabs for 'Subject', 'Sale 1', 'Sale 2', 'Sale 3', 'Sale 4', and 'Sale 5'. Below these are thumbnail images of properties, some with 'Don't Use' buttons. The main window shows a detailed view of the subject property: 18 HENRY Mooseport, with a subject AV of 431,000.00, GLA of 1626, and a built year of 1956. The 'Proximity' table lists nearby sales with columns for Proximity, Sale Price, GLA, Waterfront, and Class. The table is sorted by Proximity. A summary section on the right shows the total adjusted value of 515,767.63. The bottom of the screen shows a 'Finished' button and a list of selected sales.

Proximity	Sale Price	GLA	Waterfront	Class	GLA	Waterfront	Class	Adjusted Value
0.02	14 HENRY	1626	0	SPLIT LEVEL	1497	0	210	467
0.06	27 HENRY	1626	0	SPLIT LEVEL	1626	0	210	-7540
0.09	35 HENRY	1626	0	SPLIT LEVEL	2597	0	210	66460
0.09	22 MC LOUGHLIN	1497	0	SPLIT LEVEL	1497	0	210	13388
0.09	31 DANIEL	1626	0	SPLIT LEVEL	1626	0	210	3893
0.09	21 GERMAIN	1414	0	OLD STYLE	1414	0	210	59821
0.12	39 DANIEL	1509	0	SPLIT LEVEL	1509	0	210	14019
0.12	18 JACKSON	733	0	COTTAGE	733	0	210	111845
0.17	7 JACKSON	1109	0	OLD STYLE	1109	0	210	86110
0.24	70 VALENTINE	743	0	COTTAGE	743	0	210	116569
0.26	61 COLES	1339	0	OLD STYLE	1339	0	210	72670
0.29	55 VALENTINE	1000	0	OLD STYLE	1000	0	210	99207
0.30	57 SOUTHFIELD	2731	0	SPLIT LEVEL	2731	0	210	125669
0.31	6 CARPENTER	1794	0	OLD STYLE	1794	0	210	65683

ESC Software for Small Claims has added an exciting feature that extends the already outstanding flexibility of the program.

ESC can now select and replace any sale in the market analysis with any sale available in the Sales table.







The proximity screen can be sorted by proximity, sale price, GLA, waterfront or property class. You select the sale you want to use from the Proximity screen and then select the sale you wish to replace, press a key and the sale is replaced!

Scroll through the list and click to select the sale you want to insert into the sales analysis. As you scroll, you can also view a picture of the property. You use the Select and Replace button to place proximity sales into the market analysis.

You can replace as many sales as needed in preparing an Equitable Small Claims market analysis report.

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Screen Shot 5 – Market Analysis Report

Owner: RIZZARDI - DYER, KIM		Municipality: Mooseport					Run Date: 10/19/2012 09:53:48	
Address: 18 HENRY		Subject	Sale 1	Sale 2	Sale 3	Sale 4	Sale 5	
Legal Id: 81/238/8								
Valuation Date: 01/01/2012 RAR: 1.0000 % Assessed Value: \$431,000 Subject Eq Value: \$431,000								
Address:	18 HENRY	14 HENRY	27 HENRY	31 DANIEL	22 MC LOUGHLIN	39 DANIEL		
Municipality:	Mooseport	Mooseport	Mooseport	Mooseport	Mooseport	Mooseport		
Legal Id:	81/238/8	81/238/9	81/237/10	81/239/11	81/236/1	81/240/1		
School District:	5	5	5	5	5	5		
Class:	210	210	210	210	210	210		
Style:	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL	SPLIT LEVEL		
Neighborhood:	17	17	17	17	17	17		
Age/Effective/Age:	1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956	1956 / 1956		
Proximity:		0.02	0.06	0.09	0.09	0.12		
Sales Date:		06/24/2010	06/07/2011	05/10/2010	01/13/2010	01/18/2011		
Sale Price:		468,000	420,000	442,900	300,000	460,000		
Time Adjustment:		56,160	28,800	53,148	36,000	52,774		
Location:	Average	Average 0 %	Average 0 %	Average 0 %	Fair 5 %	Average 0 %		
Condition:	Average	Average 0 %	Average 0 %	Average 0 %	Fair 5 %	Average 0 %		
Adjusted Sale Price:		524,160	448,800	496,048	366,000	512,774		
		Adjustments		Adjustments		Adjustments		
Land Area:	0.23	0.23	0.23	0.23	0.21	0.24		
GLA:	1626	1497	1626	-342	1497	-1,686		
#Full Baths:	1	1	1	5,160	1	4,680		
#Half Baths:	1	1	1		1			
Basement:	Full	Full	Full		Full	Full		
Garage:	1	1	1		1	1		
Fireplace:	1	0	1	5,000	2	0	5,000	
Central Air:	None	None	CAC	-5,000	None	CAC	-5,000	
Waterfront:						IG		
Pool:					as is			
Other:								
Total Adjust:		10,160	-5,342		-2,342	2,800	2,994	
Adj Value:		534,320	443,458		493,706	368,800	515,768	
Market Value: \$485,000							Printed: 10/19/2012 09:53:48	

This is the market analysis report that can be used at small claims hearings. Notations here are for illustration purposes and are not printed on the actual market analysis report.

Any changes made to the original market analysis through sales elimination, adjustments or proximity sales replacement are reflected in the report.

Other Modes of Market Analysis Report Preparation

Mass – Market Analysis Reports for a portion or all of the small claims cases can be prepared at the same time. This method is desirable when negotiations can be arranged prior to a small claims hearing. A one case per line worksheet can be prepared that can also be used in conjunction with a full market analysis report.

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Other Modes of Market Analysis Preparation – continued

Once small claim cases have been calendared, you can prepare Market Analysis by court date, print hearing worksheets, print single line Market Value report (below), enter hearing results and print final hearing reports

Hearings Calendar – each calendar can be run independently, preparing Market Analysis reports for each case on the calendar. Each court calendar can also be tracked independently.

Screen Shot 6 - One case per line worksheet

Market Value Report for Hearing Date: 05/15/2012 Mooseport
Valuation Date: 01/01/2012 RAR: 1.

AR#	Sbl	Address	Owner	Sale 1	Sale 2	Sale 3	Sale 4	Sale 5	SBJEv	MV
3090152011	91/23/437	14 CHESTNUT	GOLDSTEIN, MICHAEL	312,872	341,582	459,378	563,538	388,736	466,000	397,000
3090042011	90/52/14	26 BRYCE	BARNES, MATTHEW,& KIRS	624,667	578,659	558,704	584,202	472,087	525,000	574,000
3090062011	90/56/53	25 BRYCE	FEDERICO, CARRIE	308,360	380,339	364,582	359,781	351,522	351,000	359,000
3090072011	90/56/54	23 BRYCE	SALERNO, MICHAEL	304,840	379,718	363,263	356,111	351,963	343,000	358,000
3090092011	90/81/8	15 BRANDING IRON	SUNSHINE, STACEY	582,609	458,440	528,519	553,869	521,153	496,000	535,000
3090102011	90/82/27	16 BRANDING IRON	FRANCISCO, R.& H. LIV TRU	514,636	539,986	479,372	495,097	507,763	471,000	506,000
3090082011	90/67/2	MILLFORD LA	BRITT, MICHAEL & TATIANA	570,466	541,555	399,388	508,273	345,527	431,000	484,000
3089952011	83/53/1	29 HIGHLAND	WALSH, JAMES & MARGARE	582,721	514,948	888,316	701,682	825,654	584,000	704,000
3089942011	83/6/50	46 FRANKLIN	VILLELLA, GIOVANNI & IDA	937,685	1,030,900	720,797	575,069	738,136	695,000	799,000
3089982011	83/E/556	62 HIGHLAND	MULRY, SEAN & ADELAIDE	1,103,188	972,455	965,950	746,410	683,148	752,933	895,000
3089932011	82/16/112	39 NASSAU	MORRA, JOSEPH & MARIA	606,881	562,501	771,036	540,401	456,447	535,000	570,000
3089912011	81/247/7	3 DUKE	COYLE, MICHAEL&STRAVRO	543,198	483,563	447,880	541,269	392,887	425,000	491,000
3089922011	81/B/201	35 HENDERICK	STRZALKOWSKI, VIEUX &	329,723	556,828	534,738	386,356	441,349	450,000	455,000
3090012011	90/37/54	9 SOUTHLAND	MOSES, DONALD & SARAH	807,738	851,012	482,550	694,271	638,724	732,000	714,000
3090032011	90/42/593	8 SEPTEMBER	LEVINE, JOAN BLACKER	1,034,996	994,062	1,315,914	958,026	1,357,846	1,362,000	1,115,000
3090022011	90/42/542	4 SEPTEMBER	GENZEL, RON & LINDA	919,920	784,287	1,086,428	848,635	1,119,219	944,000	952,000
3090132011	90/90/17	OLD TAPPAN	GARCIA, ROBERT	1,742,117	1,405,618	1,678,286	1,555,028	1,833,724	1,553,042	1,659,000
3090112011	90/88/143	BROKAW	O'HARE, JOAN	709,535	700,964	659,681	702,340	791,218	680,000	705,000
3090122011	90/88/149	20 SPARROW	SIMONE, ROBERTA (RLT)	682,233	732,267	727,407	820,285	705,126	650,000	722,000
3089962011	83/69/23	24 MATINECOCK FAR	MORABITO, CARRIE & TERR	1,142,811	1,343,548	1,377,834	1,067,648	1,576,065	1,294,000	1,289,000
3089972011	83/69/39	15 RABBIT	VANDER POEL, BEVERLY	909,863	820,521	620,130	719,736	834,895	733,000	792,000
3089992011	83/G/240	23 TOWNSEND	SALVATORE, THOMAS	1,314,762	1,164,876	1,470,200	1,191,504	1,351,694	1,439,000	1,286,000
3090002011	83/G/1055	1 TOWNSEND	BOZZELLO, CHARLES	566,162	700,177	652,422	594,959	586,391	612,003	612,000
3090142011	90/90/18	75 OLD TAPPAN	GARCIA, ROBERT	502,286	393,771	463,293	536,751	479,288	600,000	482,000
3090162011	91/47/408	4 JACKSON	YATAURO, BERNARD	2,052,055	1,891,114	1,238,568	1,511,236	1,548,168	1,509,600	1,651,000

25 Cases For Hearing Date 05/15/2012

This is an example of a one line market analysis worksheet for a specified hearing date. Using this worksheet, small claim cases could be negotiated before going to a hearing. This would significantly reduce costs in processing small claims.

ESC Equitable Small Claims Software

ESC is currently being used by ten local municipalities on Long Island to help defend their Small Claims and the list continues to grow.

There are many features in ESC that are not displayed here due to lack of space. Features needing additional explanation are also not displayed here.

The reason for that is we want to give the assessor as full of an explanation of the software as they need to understand the full range of value in ESC software.

We would be happy to arrange a demonstration of ESC and spend as much time as needed to let you fully appreciate the value of this unique program.

Thank you for your time.

William J. Eyring

Michael Haberman Associates, Inc.